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Improving logistics service quality in freight-forwarding in Hochiminh City, Vietnam

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Despite bringing enormous profit to the company as well as the development of the country, logistics is still considered a new and developing field in Vietnam. There are currently a large number of local logistics companies and most of them are working as second and third-party agents. However, they account for a very small market share and are losing to the foreign corporations. One of the main reasons is low-rated service quality.

Service quality plays a vital role in gaining new customers as well as retaining the loyal ones. Due to its special characteristics, it is hard to give a complete evaluation about service quality of a company. SERVQUAL model is considered as one of the most common tools to assess that, which is based on five factors: reliability, assurance, tangibles, responsiveness and empathy.

This thesis introduces main concepts of logistics activities and service quality assessment, focusing on third-party services and SERVQUAL model. It also states the general current situation of Ho Chi Minh City and local freight forwarders operating there. Quantitative method was applied via surveys distributed on Facebook, online business forums and the author’s network of friends who are working at local logistics firms. The questionnaire was targeted to both individual and corporate customers who are using logistics services of HCMC freight-forwarding companies. 127 responses were successfully collected after five weeks to reveal customers’ true opinions on service quality in those domestic firms. The result has showed many weaknesses of those companies especially in the reliability and assurance factor. From there, some recommendations are given to improve service quality in HCMC’s freight forwarders.
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1 Introduction

Logistics plays an important role in bringing enormous profit to the success of a company as well as the development of national economy. Nonetheless, it is still considered a new and developing field in Vietnam. According to the roadmap of joining WTO, Vietnam has officially opened its doors for the logistics field in 2014. In addition, with the recent successful negotiations of the government, there is a high chance that Vietnam will be able to sign the Trans-Pacific Partnership (TPP) soon in 2016. Joining TPP with nearly 0% export-import tariff promises an “explosion” of logistics services in Vietnam (Bloomberg, 2015). As a matter of fact, Vietnam has some advantages in developing logistics such as lying in the centre of South East Asia and having long coastline. However, in the current reality, most Vietnamese logistics companies are losing this competitive market. According to Supply chains magazine (2014), at the moment there are around 1000 local logistics companies compared to 25 foreign companies. However, most of domestic firms are small and medium enterprises and only contribute to 20% of the market share; the rest 80% belongs to foreign companies. Vietnam’s logistics companies mostly only serve as sub-contractors or agencies. To explain for this market share loss, beside objective limitations such as government regulations or transportation infrastructure, the service quality of local companies is definitely not as good and professional as the one of foreign corporations. They compete by reducing price but neither improving service quality nor following any standards. Therefore, this thesis hopes to provide some overview of the current situation of domestic freight-forwarders in Hochiminh city (HCMC), analysis of their service quality via quantitative survey and some recommendations to improve the service quality.

1.1 Research objectives and scope

The thesis has the following research objectives

- Research theoretical concepts from which define the key elements of service quality and customer service in logistics.
- Assess the current situation of domestic freight-forwarders in HCMC.
- Identify the level of customer satisfaction for the logistics service quality in local freight-forwarding business in HCMC.
- Propose solutions to enhance the quality of logistics services in those HCMC enterprises.

Thesis scope is limited within HCMC area because this city is an economic hub with a lot of freight-forwarders and enterprises using logistics services. In addition, the author is living here and has a wide network of friends as well as relatives working in logistics firms, so it is much easy and convenient to conduct surveys in HCMC rather than anywhere else.

1.2 Methodology

The author mainly uses quantitative method to examine, investigate and analyse data in order to help the topic gain feasible and factual basis. The questionnaire is targeted to both individual and corporate customers who are using logistics services of local freight-forwarding companies in HCMC. The total time from sending the first questionnaire to collecting the last piece of answer is approximately five weeks (between mid-February and late-March 2016). At first, the author sent messages to hundreds of friends on Facebook (who used to and are using logistics service from local firms), and asked if they were willing to complete the survey. 29 answers were collected, which was totally not enough, so the questionnaire were later posted on some Vietnamese business forums such as vietship.vn and forum.bizweb.vn. The number of respondents increased a little bit to 62 in total. In addition, the author used to study two years in HCMC Foreign Trade University; therefore, thanks to a wide network of friends who used to study at the same university in HCMC and now work at different logistics companies, they were asked to forward the questionnaire by email to lots of their customers. As a result, more than 50 answers were received after one month. The more respondents the better, so the author spent nearly a week going directly to many local logistics firms in HCMC and asking customers there to fill in the survey in paper. Many of the companies were willing to help but some politely rejected. Finally, a total of 152 responses were collected; however, there were also some invalid answers so the number of usable and valid answers was 127. The total number of companies in this survey was 48 and they range from famous corporations such as Gemadept or Vietrans to very small enterprises that are hardly heard of before. The answers were later analysed by SPSS statistics software to give out the most accurate and scientific result.
The total quantity of respondents is just 127, which is not high enough to make any “waterproof” conclusions. There should be at least hundreds of answers to contribute to a very good quantitative research, which was impossible to obtain in this time scope. Nonetheless, it still helped the author to achieve some insight and points of view to be proved and shown to the readers.

2 Service quality

2.1 Service quality concept

2.1.1 Quality

Quality is a concept that has been used very commonly in many areas of human activities. However, to fully understand what quality means is not a simple matter. The definition can vary depending on different products, manufacturers, or market needs. Generally, Juran (1998: 27) defines quality as factors of products which meet customer requirements and therefore provide client satisfaction. Quality also means “freedom from deficiencies – freedom from errors that require doing work over again (rework) or that result in field failures, customer dissatisfaction, customer claims, and so on”. Thus, any product, no matter how durable or well-packaged but not satisfying the customer demand, is considered to have unsatisfactory quality. This is an important awareness to help companies to plan for the quality of products and services. In order to satisfy the needs, firms must ensure quality in all stages of the production and distribution of products and services. For example, just one disappointment with the attitude of warranty staff might damage the whole earlier stages. In other words, quality is formed through several stages and influenced by many different factors.

The primary focus of quality management is to meet customer requirements and to strive to exceed customer expectations (ISO 9001:2015, 2015). Quality plays an essential role in business strategy as it creates differentiation with competitors, helps to obtain sustainable competitive advantage and gains trust from customers. Since quality is basically "to satisfy the needs, clients will not continue to use the product in the future if they do not feel contented."
2.1.2 Service

Kotler and Scheff (1997: 193) define service as “any act of performance that one party can offer to another that is essentially intangible and does not result in the ownership of anything. Its production may or may not be tied to a physical product.”

Service is a special product as it certainly has unique characteristics (Kotler and Scheff 1997: 193-195).

- **Intangibility:** Unlike physical products, service cannot be heard, tasted, hold, seen or felt before being bought. Customers only receive service as soon as it is provided; therefore, to reduce the level of uncertainty in buying decision, purchasers will search for signs and physical proof of quality such as price, brand name or reviews that they see.

- **Perishability:** Due to intangibility, service is considered very perishable as it cannot be stored or preserved. Take movie ticket as an instance; it will lost value when the movie begins.

- **Inseparability:** A service is inseparable from providers. Service delivery process occurs continuously, which means that the process of providing and receiving service is carried out simultaneously and at the same time with the presence of the customer. Therefore, the quality of service is difficult to predict since it will be based on subjective judgments from customers.

- **Variability:** Quality of service depends on providers, time and location. For instance, the performance of a singer might be not as good as expected if he or she is in sickness or if the opera hall’s sound system is not in good quality. Hence, this is an important feature that suppliers should note if they want to improve their service quality. Organizations can overcome this challenge by investing in staff training, standardization and implementation processes, and monitoring and measuring customer satisfaction regularly.
2.1.3 Service quality

Zeithalm, Parasuraman, and Berry (1990: 16) explained

Service-quality perceptions stem from how well a provider performs vis-à-vis customers’ expectations about how the provider should perform... Service quality is a focused evaluation that reflects the customer’s perception of specific dimensions of service namely reliability, responsiveness, assurance, empathy, tangibles.

It is undoubtedly not easy to give a complete definition of service quality because service quality is also intangible product. A special feature is that customers can only assess the full quality of service after purchasing and using them. Quality is rated not only on the result of service but also on the whole process. Customers assess service quality based on attitudes, subjective, and the ability to recognize.

Since the quality of service relate to customer’s expectations as well as their perception of the service, service quality is difficult to assess. Usually there are three levels of assessment of quality services:

► Good: when customers perceive the service beyond their expectations.
► Satisfactory: when the service levels their expectations.
► Poor: when the service is below customers’ expectations.

Therefore, in order to retain customers, enterprises must always maintain good reviews so that they can survive and develop.

2.2 Service quality assessment

The ultimate goal of all activities of the enterprise is to satisfy customers. Time after time, the needs of people gradually increase with higher demands for the quality of goods and services. In this competitive market economy, consumers obviously have more opportunities to choose which company satisfies them the best, and they require better service attitude of staff, faster inquiry response from service provider as well as more modern service equipment. Hence, enterprises aiming to retain old customers and attract new customers must provide excellent quality service to satisfy them. Since then, the question of how to measure service quality has gained a lot of attention and research.
Among that emerged a famous five-gap service quality model conducted by Zeithaml, Parasuraman and Leonard Berry. According to Seth, Deshmukh and Vrat (2005), as they critically examine nineteen different service quality models between 1984 and 2003, there are up to eight models based on the five-gap model. This is a rather large proportion so we can easily see that this model is considered to be quite trustworthy by many researchers.

2.2.1 The five-gap model

This model is considered to be quite specific and detailed with identification five gaps that may cause customers to experience poor service quality. Not only does it compare between customers’ expectation and reality but it also takes into account the service that companies want to provide. In addition, it mentions that service quality is affected by the difference between customers’ expectations and companies’ perception (Zeithaml et al. 1990: 37-46). The five-gap model of service quality is illustrated in Figure 1.

- Gap 1: appears when there is difference between consumer expectation and management perception. The basic point of this gap is that companies do not fully understand the necessary characteristics of their own organization’s service quality as well as service delivery to satisfy customers.

- Gap 2: between management perception and service quality standards. It means that the organization finds it difficult to turn customers’ expectations into appropriate performance standard. The reason is possibly not-well-trained staff or too-high demand of customers.

- Gap 3: between service quality performance and service delivery. This happens when the staffs are unable to provide and meet the set service standard.

- Gap 4: between service delivery and external communications. This happens when the promotional campaign and advertisements do not meet reality, which will easily lose customers’ trust in the company image.
• Gap 5: between expected service and perceived service. The service quality assessment depends mostly on the fifth gap while this gap five is also affected by the first four gaps above. If the customers do not feel any difference between their expectation and reality, that service would be rated excellent. So the ultimate goal is to reduce these gaps to increase customers’ satisfaction.

Figure 1. The five-gap model of service quality (Zeithaml et al. 1990: 18).

2.2.2 SERVQUAL model

From the general five-gap model, Zeithaml et al. tried to build a more specific and practical measurement scale to assess the service quality in reality. They originally thought that any service is rated based on ten factors: reliability, responsiveness,
competence, access, communication, courtesy, credibility, security, understanding and tangibles.

Table 1. Original ten dimensions of service quality (Zeithaml et al. 1990: 21-22).

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Examples of specific questions raised by customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tangibles: Appearance of physical facilities,</td>
<td>• Are the facilities attractive?</td>
</tr>
<tr>
<td>equipment, staff, communication materials.</td>
<td>• Is my stockbroker dressed appropriately?</td>
</tr>
<tr>
<td></td>
<td>• Is my credit card statement easy to understand?</td>
</tr>
<tr>
<td>Reliability: Ability to perform the promised</td>
<td>• When that officer says she will call me back in 15 minutes, does she do so?</td>
</tr>
<tr>
<td>service dependably and accurately.</td>
<td>• Does the stockbroker follow my exact instructions to buy and sell?</td>
</tr>
<tr>
<td></td>
<td>• Is my credit card statement free of errors?</td>
</tr>
<tr>
<td>Responsiveness: Willingness to help customers</td>
<td>• When there is a problem with my bank statement, does the bank resolve the problem quickly?</td>
</tr>
<tr>
<td>and provide prompt service.</td>
<td>• Is my stockbroker willing to answer all my questions?</td>
</tr>
<tr>
<td>Competence: Possession of required skills and</td>
<td>• Is the bank teller able to process my transactions without fumbling around?</td>
</tr>
<tr>
<td>knowledge to perform service.</td>
<td>• Does my brokerage firm have research capabilities to accurately check market developments?</td>
</tr>
<tr>
<td>Courtesy: Politeness, consideration, respect,</td>
<td>• Does my broker refrain from acting busy or being rude when I ask questions?</td>
</tr>
<tr>
<td>and friendliness of contact personnel.</td>
<td>• Are the telephone operators in the bank consistently polite when answering my calls?</td>
</tr>
<tr>
<td>Credibility: Trustworthiness, honesty,</td>
<td>• Does the bank have a good reputation?</td>
</tr>
<tr>
<td>believability of the service provider.</td>
<td>• Does my broker refrain from pressuring me to buy?</td>
</tr>
<tr>
<td></td>
<td>• Are the interest rates/fees charged by my bank consistent with the services provided?</td>
</tr>
<tr>
<td>Security: Freedom from danger, risk, or doubt.</td>
<td>• Is it safe for me to use the bank’s ATM?</td>
</tr>
<tr>
<td>Access: Approachability and ease of contact.</td>
<td>• Is my credit card safe from unauthorised use?</td>
</tr>
<tr>
<td></td>
<td>• How easy is it for me to talk to bank senior officials when I have a problem?</td>
</tr>
<tr>
<td></td>
<td>• Does the bank have a 24-hour, toll-free telephone number?</td>
</tr>
<tr>
<td>Communications: Keeping customers informed in</td>
<td>• Can the officer explain clearly the various charges related to the mortgage loan?</td>
</tr>
<tr>
<td>language they can understand and listening to</td>
<td>• When I call my bank, are they willing to listen to me?</td>
</tr>
<tr>
<td>them.</td>
<td></td>
</tr>
<tr>
<td>Understanding the customer: Making effort to</td>
<td>• Does someone in my bank recognise me as a regular customer?</td>
</tr>
<tr>
<td>know customers and their needs</td>
<td>• Does my broker try to determine what my specific financial objectives are?</td>
</tr>
<tr>
<td></td>
<td>• Is the credit limit set by my bank consistent with what I can afford?</td>
</tr>
</tbody>
</table>

One big advantage is that it covers almost all characteristics of service; however, at the same time investigating and analysing all these ten components is such a hard work that they later simplified into only five factors called SERVQUAL model. After conducting
several exploratory and quantitative researches in five different service sectors, they discovered that there is a significant correlation among items representing plenty of the original dimensions. Specifically, the last seven dimensions in Table 1 were consolidated into two broader dimensions assurance and empathy. The rest of Table 1 – tangibles, reliability and responsiveness remained intact (Zeithaml et al. 1990: 25). Table 2 illustrates the correspondence between SERVQUAL five dimensions and the Original ten dimensions.

Table 2. Correspondence between SERVQUAL dimensions and Original ten dimensions for evaluating service quality (Zeithaml et al. 1990: 25).

<table>
<thead>
<tr>
<th>Original ten dimensions for evaluating service quality</th>
<th>SERVQUAL Dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tangibles</td>
<td>Reliability</td>
</tr>
<tr>
<td>Reliability</td>
<td>Responsiveness</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>Assurance</td>
</tr>
<tr>
<td>Competence</td>
<td>Empathy</td>
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<tr>
<td>Courtesy</td>
<td></td>
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<tr>
<td>Credibility</td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td></td>
</tr>
<tr>
<td>Access</td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Understanding the customer</td>
<td></td>
</tr>
</tbody>
</table>

Not only is SERVQUAL model widely accepted by researchers but it also used and applied in reality more than any other models to assess service quality in many different fields. Some examples are health/hospital by Bowers, banking by Cronin and Taylor, hotel by Fick and Ritchie, etc. (Buttle 1996: 8).
3 Logistics

3.1 Logistics concept and services

International Federation of Freight Forwarders Associations FIATA states that

Freight Forwarding and Logistic Services means services of any kind relating to the carriage (performed by single mode or multimodal transport means), consolidation, storage, handling, packing or distribution of the Goods as well as ancillary and advisory services.

Commercial Law of Vietnam, Article 233 defines

Logistic services are commercial activities whereby traders organize the performance of one or many jobs including reception, transportation, warehousing, yard storage of cargoes, completion of customs procedures and other formalities and paperwork, provision of consultancy to customers, services of packaging, marking, delivery of goods, or other services related to goods according to agreements with customers in order to enjoy service charges.

It is hard to find a complete definition of logistics since there are various types of companies, products and systems. Rushton, Croucher and Baker (2010: 6) give a quite basic approach that logistics concerns “the efficient transfer of goods from the source of supply through the place of manufacture to the point of consumption in a cost-effective way whilst providing an acceptable service to the customer”. This definition basically mentions the core of logistics as optimization and effectiveness to ensure the goods to be delivered to consumers at the right time at the lowest cost, which is a quite appropriate modern concept that applies to most industry.

As one logistics system cannot apply to all businesses, the number of activities can vary from company to company. Generally, there are five main components of logistics: transportation, warehousing, inventory, packaging and information technology, which are shown more specifically in Figure 2.
Figure 2. The main activities of logistics (Rushton et al. 1989: 6).

Types of logistics operations and freight-forwarding can be classified as follows (Leuween, 2014).

- **1PL – First Party Logistics**: The owner of the goods organises and carries out logistics operations by themselves. They must invest in transport, storage, information systems, management and labour to manage all the process.

- **2PL – Second Party Logistics**: Manufacturer hires a 2PL company to conduct a single operation in the logistics chain (transport, warehousing, customs procedures, billing, etc.). This 2PL company only works as a subcontractor for a clearly defined logistics task while manufacturer still take responsibility for the follow up. The relationship between two sides is often short-term as the supplier does what the client instructs and gets paid accordingly.

- **3PL – Third Party Logistics**: The outsourcing to 3PL has increased dramatically in recent years. 3PL firms work on behalf of owners to manage and implement logistics services for each department functions; for instance, to carry out
procedures for export and domestic transportation, to do customs clearance, or to transport goods to the prescribed places... 3PL includes many different services and helps to maintain a long-term partnership between service provider and client. In addition, it also helps manufacturer to focus on core competencies, avoid large investment in logistics facilities, improve standards of service, etc. Nevertheless, some drawbacks are loss of control over logistics operations within the company, partial loss of direct customer contact, or high risk of customer service failure.

- **4PL – Fourth Party Logistics:** is the integrator, who unifies resources, potentials and facilities of its science and technology with other organisations to design, build and operate the entire supply chain solutions for clients. A 4PL is non-asset based and acts like a separate entity between customer and multiple logistics service providers. A 4PL provides the whole supply chain perspective and visibility, technical vision, flexibility, etc. The major disadvantage might be high cost and control loss over the supply chain function within the company.

- **5PL – Fifth Party Logistics:** aims to serve e-commerce section. Generally, 5PL is basically 3PL or 4PL managing supply chain network of e-business platform.

Many companies use third-party enterprises to manage their shipping needs, in which freight forwarders are one of the most common types of third-party. They provide typical services such as: (Grant 2012: 70).

- Prepare shipping documents
- Book space from carriers
- Arrange goods movement from original point to destination point
- Prepare custom clearance
- Advise customers on import/export regulations, documentations, etc.
- Have a good knowledge of shippers, ports, different means of transport and their costs, etc.
- Prepare insurance, letters of credits, etc.

Nowadays, the role of freight forwarders also includes these services:

- Provide their own transportation
- Arrange export packing and labelling
- Combine multiple consignments into single client movements
- Track and trace
In Vietnam, freight-forwarding is usually considered as transportation, a part of logistics, and they are mutually inclusive. As a matter of fact, freight-forwarding plays an important role in logistics like an architect. Forwarder must design an optimal route and choose suitable means of transport so as to reduce costs and still satisfy customers’ requirement.

3.2 Customer service in logistics

The three main elements of customer service in logistics are pre-transaction, transaction and post transaction. The first one means that the factors of customer service occur before the actual order takes place. These elements must be provided by supplier, for example supplier should make sure whether stock is still available and order cycle time is appropriate and consistent. Secondly, transaction elements are directly linked to the transaction and most commonly concerned with logistics. Customers usually evaluate customer service quality based on these factors such as accurate invoices and orders, on-time delivery, consistent product quality, etc. Last but not least, post-transaction elements relate to the factors occurring after the delivery takes place. This element has two sub-categories: relationship service and relationship quality. The former one includes after-sales support, actual delivery time, helpful customer service representatives and offered customised services. The latter one relates to trust, commitment and integrity between supplier and client. (Grant 2012: 18 – 22).

Figure 3 illustrates more clearly about customer service elements in logistics and main indicators of satisfaction.
Figure 3. Logistics customer service elements (Grant 2012: 18).
4 Logistics service quality of freight-forwarders in HCMC

4.1 Overview of HCMC economy

Accounting for 0.6% of Vietnam total land area and 6.6% of total population, Hochiminh City (HCMC) plays a vital role in Southern Focal Economic Zone (SFEZ), which includes the city and another six provinces. HCMC is the economic leader of Vietnam and always stays in the top position in economic growth. Its GDP and Foreign Direct Investment (FDI) account for the largest proportion of Vietnam economy as it contributes around one-third of national total GDP and one-third of the total number of FDI projects in Vietnam (Ho Chi Minh’s People committee, 2005).

As can be seen from Figure 4, HCMC is located in the centre of the South and it provides capital, labour, technology, etc. to the whole area. The economy varies from agriculture, industry and finance to mining and fisheries. The service section accounts for the largest proportion 60.5% of GDP, followed by industry section 38.6% and agriculture only 0.9% (HCMC official website, 2005). As Figure 5 illustrates, HCMC’s GDP per capita increases gradually and steadily each year, reaching approximately $5,100 in 2014 (Brookings Institute, 2014).

Figure 4. Geographical location of HCMC (Asian quality focus).
Nonetheless, the city's economy is still facing many challenges. Both global and domestic economic situation remain complicated, which is directly affecting business production and people's lives. The out-dated and overloaded infrastructure of the city, high consumer price index, social problems, and complicated administration also cause difficulties for HCMC economy.

4.2 Overview of HCMC logistics infrastructure

As a matter of fact, transportation infrastructure plays an essential role in the development of logistics. Nonetheless, HCMC has showed to have a lot of weaknesses in this, including all transport modes like road, rail, sea and air transport. This causes a high increase in logistics costs and affects both development and efficiency of logistics services.
According to Green Book report of European Union (2011), the quality of Vietnam road infrastructure was assessed poor and very poor, ranking at 102th position out of 133 nations in World Economic Forum’s 2010 Global Competitiveness Report. Turning to HCMC, Dang Dinh Dao (2011: 19) state that HCMC transport infrastructure consists of about 3800 road routes with approximate total length of 3670km. The area of parking slots just accounts for only 0.1%, not even reaching the 10% target. The road traffic system is very simple and cannot catch up with the growth speed of vehicles.

In terms of air transport, there is currently only one airport managed by Civil Aviation Authority. Tan Son Nhat Airport is able to handle only 20million people but actually served more than 22million passengers last year. Similarly, its cargo capacity is only 406,000 tons; nevertheless, last year’s real number was around 500,000 tons. It is undeniably overloaded at the moment. In recent years, the number of foreign tourists visiting Vietnam increased dramatically. In addition, the current population of Vietnam is approximately 90million but not up to 20% of that quantity ever travels by airplane. Hence, the demand for air transport is predicted to rise gradually in the future, so one airport is definitely not enough (Thanh Nien News, 2015).

Turning to railroad, there is only one single-track and non-electric North-South railway line built in the 19th century, which is very old-fashioned (JICA, 2008). The infrastructure is weak with low capacity and out-dated information control system. Most of the railway infrastructures such as railway bridges, rail trucks, track beds, signals and communication equipment, and maintenance facilities were seriously deteriorated due to the damage of the Vietnam War and lack of investments and maintenance. Take the Hanoi – HCMC route (nearly 1700km) as an example. The fastest train takes approximately 29 hours while a route of that same length probably takes only 18hours by Finnish railway. European Union (2011) evaluated that the railway system of Vietnam is the least useful means of transport because it accounted for just 5% and 2% of passenger and goods transportation respectively.

Situation in ports of HCMC is slightly better since maritime field is playing an important part in economic development and has the growth potential in the foreseeable future. The network of port clusters around HCMC is by far the largest and most technologically advanced infrastructure in Vietnam, accounting for 61% of the country’s container
throughput and 48% of total cargo throughput. The biggest disadvantages are weak-connected traffic system and out-dated loading/unloading technology. There are no direct road and railway connections to the ports; instead, they use the same public infrastructure together with urban vehicles, which significantly reduces efficiency of these ports and partly causes traffic jams. Additionally, most of the ports still use manual equipment and low-tech control system. Insufficient access to deep-water terminals and container servicing facilities are also other challenges. Besides, other shortcomings often include: insufficient connectivity with other transportation networks, inadequate logistic and auxiliary facilities, mediocre service quality, shortage of skilled professionals, substandard harbour management and excessive administrative burdens, etc. (European Union, 2011).

4.3 Overview of local freight-forwarders in HCMC

According to Supply Chains magazine (2014), Vietnam’s logistics market was worth $60 billion in 2014. It is estimated that around 1000 logistics firms are currently operating in the whole Vietnam, of which 600 – 700 firms are located in HCMC. Nevertheless, only 2.5% of them are foreign corporations but they account for up to 80% market share. It cannot be denied that this is such an unequal competition between international and domestic enterprises.

Almost all logistics firms in HCMC are small and medium enterprises with business registration capital under $7200 (Dang Dinh Dao, 2011: 7). Because of small scale and tiny capital, the local companies are only able to work as second-party logistics 2PL agents while foreign firms dominate the third and fourth-party logistics market (3PL and 4PL). Most domestic firms only handle orbiting services for international companies such as custom declaration, facility renting and especially transportation, which are very simple procedures. In general, very few companies can handle the whole process of supply chain management.

Company scale is also reflected in the number of employees. Some firms only have from three to five employees including the manager. This explains why that company can provide just one simple logistics service. The organization structure is basic and
professional level is almost zero. Moreover, most of logistics enterprises still do not open representative office in other countries while the current trend is global logistics.

In a logistics survey conducted by company Supply Chain Insight (2008) in Vietnam, 92% of manufacturers outsource their logistics, especially transportation, warehousing and custom procedure. They believe that outsourcing brings better results and the reality proves it to be true with 13% average logistics cost reduction. Even though this number is still lower than that of the world 18%, it still shows a promising demand and benefit for manufacturers when outsourcing.

However, service quality is a big problem that makes entrepreneurs hesitated to rent out forwarder as illustrated in Figure 6 and 7.

![Figure 6. Rated criteria when selecting suppliers in Vietnam (Supply chain insight, 2008).](image-url)
As can be seen from Figure 6 and 7, service quality is the top priority to choose logistics providers, followed by price and innovation. Nonetheless, it is also the most disappointing factor as 55% of surveyed companies complain about the poor quality. So it is necessary to investigate how and why local logistics firm are losing market share due to low-rated quality.

4.4 Service quality analysis based on SERVQUAL model

4.4.1 Questionnaire

Both individual and corporate customers who are using logistics services of local freight-forwarding companies in HCMC are the main targets of the research. The survey was designed to analyse service quality of local freight forwarders in HCMC from customers’ point of views. The detailed questionnaire can be found in the Appendix. As a quantitative research, the questionnaire was divided into three parts: background information (question 1 – 4), partnership situation with the current local freight forwarders (question 5 – 7), and satisfaction ratings with this company’s service quality (question 8). The questions about customer service’s ratings are based on SERVQUAL model as mentioned in chapter 2, which includes five factors: reliability (question 8.1 – 5), assurance (question 8.6 – 9), tangibles (question 8.10 – 12), empathy (question 8.13
– 16) and responsiveness (question 8.17 – 20). Besides, the author also asked three small questions (8.21 – 23) about overall evaluation towards that logistics company. It was asked whether the respondents feel satisfied with the quality in general and whether they are willing to recommend the company to other friends/relatives. Scale-rating questions account for the majority of the questionnaire so that customers can give specific evaluation on service quality. Some questions were multiple-choice while the rest were open-ended because the author wanted to know other opinions and suggestions from clients.

4.4.2 Background information

The first question is open-ended about job position, so there are a wide variety of different answers. Hence, the author decided to divide these jobs titles into three categories: staff, manager and director. For instance, purchaser or sales associate are combined to “staff” section whereas store manager or sales manager are grouped into “manager” category. The rest of the list such as account director or marketing director belongs to “director” group. Out of 127 respondents, employee position accounts for 65.4% while manager and director only take 26% and 8.7% respectively. This is easily understandable since the higher the job title a person has, the less willing he/she is to spend time completing a long survey; they are simply too busy to do that.

As Figure 8 illustrates, the majority 60.63% of companies participating are currently operating in retail section. There is no doubt that retailers need a good supply chain system to guarantee their operation. As second is service section with 22.05% and as third is industry field with 9.45%. Some companies operating in other sections also joined the survey at 7.87%.
As can be seen from table 3, it is interesting that only three large-sized companies joined the research; the rest 124 firms are all small and medium enterprises (SMEs). The author’s source from old school’s friends might have an influence on this since the majority of them are working at SMEs at the moment, so their companies’ partners are usually SMEs too. In addition, most of the local logistics firms that the author went directly there and asked their customers to fill in the survey in paper are also SMEs. Hence, this might explain for the quite small scope that these companies are operating within, in which up to 110 SMEs are trading in Vietnam and Asia, and only 17 large and medium sized companies are working globally, as Table 3 summarises. This relationship can be explained by the fact that the larger the company is, the more capital and resources they have so as to invest in wider market.
Table 3. Crosstabulation of operating market and company scale of survey respondents.

<table>
<thead>
<tr>
<th>Size</th>
<th>Market</th>
<th></th>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Asia</td>
<td>Global</td>
<td>Vietnam</td>
<td></td>
</tr>
<tr>
<td>Large-sized</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Medium-sized</td>
<td>23</td>
<td>14</td>
<td>16</td>
<td>53</td>
</tr>
<tr>
<td>Small-sized</td>
<td>30</td>
<td>0</td>
<td>41</td>
<td>71</td>
</tr>
<tr>
<td>Total</td>
<td>53</td>
<td>17</td>
<td>57</td>
<td>127</td>
</tr>
</tbody>
</table>

In question 5, respondents were then asked to choose only one local Vietnamese company to do this survey and write down the name of that company. In total, 48 local logistics enterprises were studied in this survey. They vary from famous ones like Gemadept, Vietrans to those that the author had never heard before such as ABC, Vietcoship, Anhoa express, etc. The quantity is quite large so the author cannot list all 48 names in this thesis. Based on topic of the survey, the author also wanted to know about the partnership between responded companies and their current freight forwarders. It is interesting that up to 55.12% of respondents have been working with their partners for less than three years, which is a quite short time. 30.71% had a longer relationship from 3 to 5 years and only 14.17% had worked together for more than five years (Figure 9). In question 7, when asked whether they usually change logistics companies during the last 2 years or not, more than half of the respondents said yes and surprisingly, the most common reason was that service quality is not as good and professional as expected.
Figure 9. Duration of the partnership between responded companies and their freight forwarders.

4.4.3 Reliability

In all business factors, trust plays a very crucial role, in which it creates long lasting mutual business relationship. Its importance increases even more in the field of logistics because freight forwarders, on behalf of the client, will directly conduct and guarantee smooth transportation of goods to destination safely and timely. Therefore, company owners always try to find a reliable organization to deliver their goods. However, the research result showed that customers have a very low trust level for the services that Vietnamese logistics companies undertake.
Table 4. Statistics of factor Reliability.

<table>
<thead>
<tr>
<th></th>
<th>On-time delivery</th>
<th>Keep promise</th>
<th>Avoid mistakes</th>
<th>Free resolve</th>
<th>Notify progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>N Valid</td>
<td>127</td>
<td>127</td>
<td>127</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>Missing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mean</td>
<td>2.73</td>
<td>3.02</td>
<td>2.91</td>
<td>3.32</td>
<td>2.72</td>
</tr>
<tr>
<td>Median</td>
<td>2.00</td>
<td>3.00</td>
<td>3.00</td>
<td>4.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Mode</td>
<td>2</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Std. Deviation</td>
<td>1.144</td>
<td>1.306</td>
<td>1.072</td>
<td>1.321</td>
<td>1.096</td>
</tr>
</tbody>
</table>

Firstly, trust is reflected by on-time delivery. In logistics services, on-time delivery is an extremely important factor to best meet customer needs and improve competitiveness for businesses. Customers can make decision based on this first criterion. Nonetheless, the average rating for this element is only 2.73 out of 5 (Table 4) whereas up to 44.9% and 9.45% of the respondents evaluated this quality at dissatisfied and strongly dissatisfied respectively (Figure 10).

Figure 10. Satisfaction levels of “on-time delivery” factor.
Secondly, keeping and following the promise is also another vital factor in order to build trust with customers. If the service is not as promised, customers will become disappointed and gradually lose faith in the enterprise. The mean rating of this element is 3.02 (Table 4), which is not too high but not too low also. In question 9, some customers have stated the problem that, if something goes wrong in the process of transporting goods, the local logistics companies will solve the problem very slowly and even try to avoid responsibility. This is quite understandable as most freight forwarders lack of funds and well-trained human resources, so their professionalism cannot be compared to foreign companies. Besides, transportation heavily depending on foreign shippers also prevents local firms from acting quickly and determinedly. When shipping incidents happen, they have to contact carriers, shippers as well as foreign agents, which prolongs waiting time and causes more difficulties for customers.

Thirdly, the job completed smoothly without errors will also increase customers’ satisfaction and trust. Local freight forwarders get the average rating of 2.91 in this factor (Table 4). Customers complain that the services still have many flaws such as lost goods, incorrect documentation and custom clearance, delivery not as instructed, etc. 44.09% of respondents think that their partners are doing fine now while 29.9% feel dissatisfied and 26% feel satisfied (Figure 11).
However, the problem is that some customers do not usually get free resolve if there are errors in documentation – rate 3.32 (Table 4). There are still 29.1% complaining that they were not treated thoroughly (Table 5).

Table 5. Satisfaction levels of “free resolve” factor.

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly dissatisfied</td>
<td>15</td>
<td>11.8</td>
<td>11.8</td>
<td>11.8</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>22</td>
<td>17.3</td>
<td>17.3</td>
<td>29.1</td>
</tr>
<tr>
<td>Fine</td>
<td>26</td>
<td>20.5</td>
<td>20.5</td>
<td>49.6</td>
</tr>
<tr>
<td>Satisfied</td>
<td>35</td>
<td>27.6</td>
<td>27.6</td>
<td>77.2</td>
</tr>
<tr>
<td>Strongly satisfied</td>
<td>29</td>
<td>22.8</td>
<td>22.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>127</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Credibility is also evident in the way the business works. Element “Companies always inform about the progress of project” helps customers see real progress of the work so as to update their manufacturing plan. This factor is actually the bond between logistics firms and customers. However, it is not well rated with a score 2.72 on a scale of 5 as 38.6% customers said they did not get regular update from the domestic logistics
company, and up to 41.7% thought this service is fine enough. Only 19.7% can keep track of their progress usually (Table 6).

Table 6. Satisfaction levels of “notify progress of work in advance” factor.

<table>
<thead>
<tr>
<th>Notify progress</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Strongly dissatisfied</td>
<td>20</td>
<td>15.7</td>
<td>15.7</td>
<td>15.7</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>29</td>
<td>22.8</td>
<td>22.8</td>
<td>38.6</td>
</tr>
<tr>
<td>Fine</td>
<td>53</td>
<td>41.7</td>
<td>41.7</td>
<td>80.3</td>
</tr>
<tr>
<td>Satisfied</td>
<td>16</td>
<td>12.6</td>
<td>12.6</td>
<td>92.9</td>
</tr>
<tr>
<td>Strongly satisfied</td>
<td>9</td>
<td>7.1</td>
<td>7.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>127</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

4.4.4 Assurance

It cannot be denied that first impression is very important in any relationships as it is hard to change and might affect the relationship later. The factors "companies provide accurate service right at the first time" is rated quite well at 3.65 (Table 7). It seems that local firms gain assurance from customers quite well by building great first impression.

Table 7. Statistics of factor Assurance.

<table>
<thead>
<tr>
<th>Statistics</th>
<th>First impression</th>
<th>Problem solving skills</th>
<th>Employees trust</th>
<th>Safety</th>
</tr>
</thead>
<tbody>
<tr>
<td>N Valid</td>
<td>127</td>
<td>127</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>Missing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mean</td>
<td>3.65</td>
<td>2.72</td>
<td>2.76</td>
<td>3.31</td>
</tr>
<tr>
<td>Median</td>
<td>4.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Mode</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Std. Deviation</td>
<td>.988</td>
<td>1.195</td>
<td>1.052</td>
<td>.821</td>
</tr>
</tbody>
</table>

Assurance is also reflected by problem-solving skills, which is the basis to assure customers of the quality of business services. However, respondents do not appraise this factor of local companies by giving a low grade 2.72 (Table 7). Nearly 44.9% think that this skill of domestics companies’ staff is unacceptable while only 22.04% think reversely (Figure 12). They complained that whenever an incident happens, it takes a lot of time to contact agents and wait for them to solve the problem. The reason is that Vietnamese
working culture is still heavily based on paperwork and procedures, so a large amount of time is wasted during that process.

![Bar chart showing satisfaction levels of problem solving skills]

Figure 12. Satisfaction levels of “problem solving skills of employees” factor.

From customers’ perspective, employees are the mirror reflecting employers. When a customer trusts an employee, that means he or she trusts the company too. “Employees gain total trust from customers” is a factor built on honesty, understanding, and how professional employees deal with clients. However, it seems that Vietnamese logistics enterprises have not seen the important role of human strategy because they do not really satisfy customers with a rate 2.76 (Table 7). Up to 43.3% of respondents feel dissatisfied with this factor when only 20.47% like the service (Figure 13).
As dealing with any business enterprise, customers always want to feel safe when doing transactions with companies. Freight forwarders should have ability to guarantee customers’ assets. As analysed in chapter 3, most local firms are small-sized and do not have much capital, so their financial resources are not sufficient enough to insure the value of large customers’ assets. Nonetheless, since the customers of domestic freight forwarders are also mostly SMEs, they seem to be quite contented with this factor with an average rating 3.31 (Table 7). As Figure 14 illustrates, the number of respondents satisfying with this factor is pretty high at a total of 44.09%, and just a small proportion 13.39% do not agree with that.

Figure 13. Satisfaction levels of “employees are trustworthy” factor.
Service quality is intangible so customers tend to look for signs or physical evidence related to the quality of the services they use such as people, information, location, devices, etc. The research shows that this factor is quite poorly assessed by customers.

Table 8. Statistics of factor Tangibles.

<table>
<thead>
<tr>
<th>Statistics</th>
<th>Uniform</th>
<th>Equipment</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>N Valid</td>
<td>127</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>Missing</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mean</td>
<td>3.72</td>
<td>3.05</td>
<td>2.21</td>
</tr>
<tr>
<td>Median</td>
<td>4.00</td>
<td>3.00</td>
<td>2.00</td>
</tr>
<tr>
<td>Mode</td>
<td>5</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Std. Deviation</td>
<td>1.159</td>
<td>.881</td>
<td>.888</td>
</tr>
</tbody>
</table>

Firstly, uniforms are usually considered as symbolic image of the enterprise, which helps to create the best impression about professionalism, cultural level as well as corporate brand. Most respondents rate the local firms’ uniform good-looking and polite at a high
score 3.72 (Table 8). However, some respondents still complained that some companies do not have uniform and employees just wear free-style dressing to workplace, which makes very unprofessional first impression to customers. It is such a pity that those companies just miss a profitable investment channel to promote their brands better.

In terms of modern and high-tech equipment, the average rating of this factor is neither good nor bad at 3.05 (Table 8). On one hand, it is interesting that 60.63% of the respondents have neutral opinion on this matter (Figure 15). On the other hand, there are still plenty of room for enterprises to improve this situation and gain more trust from the customers.

![Figure 15](image)

Figure 15. Satisfaction levels of "companies’ equipment” factor.

In logistics sector, one of the most concerned issues is "corporate website". However, this factor was not appreciated by customers as they give it a rating only 2.21 on the scale 5 (Table 8). More than half of the respondents feel dissatisfied and 18.11% are strongly not satisfied with local companies’ websites (Figure 16), which is a very high proportion. Customers stated that Vietnamese websites run way far behind those of foreign logistics companies. The local websites simply introduced the company and
offered service, but totally lacked necessary utility such as track and trace tool (order tracking), schedules, e-booking (book online), etc.

Figure 16. Satisfaction levels of “companies’ websites” factor.

4.4.6 Responsiveness

In the fiercely competitive economy today, quick response and timely conduction play a major role in the success of business. Table 9 illustrates the average rating of this factor in customers’ points of view.

Table 9. Statistics of factor Responsiveness.

<table>
<thead>
<tr>
<th>Statistics</th>
<th>Provide on-demand service</th>
<th>Arrange suitable working time</th>
<th>Timely respond to demand</th>
<th>Willing to assist</th>
</tr>
</thead>
<tbody>
<tr>
<td>N Valid</td>
<td>127</td>
<td>127</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>N Missing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mean</td>
<td>2.80</td>
<td>4.19</td>
<td>3.40</td>
<td>3.83</td>
</tr>
<tr>
<td>Median</td>
<td>3.00</td>
<td>4.00</td>
<td>3.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Mode</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Std. Deviation</td>
<td>.952</td>
<td>.941</td>
<td>1.217</td>
<td>1.047</td>
</tr>
</tbody>
</table>
The majority of respondents really enjoy the service “companies willing to arrange suitable working time for customers” and give it a rating of 4.19 (Table 9). It seems that local freight forwarders are doing great job in flexibility as more than 80% people feel satisfied with this factor and only less than 5% disagree with that opinion (Figure 17).

![Figure 17. Satisfaction levels of “companies arrange suitable working time for customers” factor.](image)

The two factors “Always timely respond to customer demand” and “Employees are always willing to assist customers” are also both quite well rated at 3.4 and 3.83 respectively (Table 9). However, more than dozens of respondents said that usually it is very quick and easy to contact their local freight forwarders, but if any problem happens to their cargo, they have to wait for a quite long time to get the situation solved. It is undeniable that the local firms respond quickly but are not very helpful at all eventually.

On the contrary, the rating is quite low for factor “willing to provide on-demand service” at 2.8 (Table 9). 40.16% do not feel happy with this service quality while only slightly over 20% are satisfied (Figure 18). Customers claimed that their freight forwarders would prefer to stick to available services rather than doing something new. They are not flexible enough to adapt to customers’ requirements. The reason is probably because of low-skilled labour resources and paperwork procedures. The employees are not
trained well enough to conduct new services, and even if they have qualified capability, the lengthy procedures will somehow prevent that from happening.

![Figure 18](image)

Figure 18. Satisfaction levels of “companies willing to provide on-demand service” factor.

4.4.7 Empathy

Nowadays, companies no matter how large or small all face the challenge of retaining loyal customers because the cost to attract new customers is always much higher than the cost of retaining old clients. Customers always want friendly and enthusiastic communication in which they can talk, share and be listened. They also enjoy being treated like important customers. Not only does empathy help to create a close relationship with clients but it also plays a critical role in retaining customers. In general, this factor in local freight forwarders is not much appreciated by customer.
Table 10. Statistics of factor Empathy

<table>
<thead>
<tr>
<th></th>
<th>Customer support policy</th>
<th>Listen to feedback</th>
<th>Take care and pay attention</th>
<th>Understand customers' needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>N Valid</td>
<td>127</td>
<td>127</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>Missing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mean</td>
<td>2.81</td>
<td>3.13</td>
<td>2.99</td>
<td>3.06</td>
</tr>
<tr>
<td>Median</td>
<td>2.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Mode</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Std. Deviation</td>
<td>1.037</td>
<td>.713</td>
<td>.812</td>
<td>1.167</td>
</tr>
</tbody>
</table>

Firstly, the two elements “employees always take care and pay attention to customers” and “always try to understand customers’ needs” are rated mostly as “acceptable” at 2.99 and 3.06 respectively (Table 10). Customers said that the staff is still quite passive and does not actively care for small details. For example, customers usually have to contact their freight forwarders first. The local firms are not sophisticated enough to recognise clients’ problems and actively solve them in advance. That is the reason why domestic companies just satisfied less than 30% of respondents in these two factors while approximately 56% and 38% of participants thought these factors are fine and acceptable (Figure 19 and 20).

![Figure 19. Satisfaction levels of “employees take care and pay attention to customers” factor.](image)
Respondents gave a quite neutral opinion on factor “always listen to customers’ feedback” at a rate of 3.13 (Table 10). Some people complained that the freight forwarders actually do listen to feedback, but they do almost nothing to improve that. Good attitude does not really go along with action very well.

Local companies still have not focused much on customer support policy, especially the post-transaction phase. Therefore, they just received a rating of 2.81 (Table 10). More than 50% of respondents are dissatisfied with this service.
4.4.8 General opinion

When asked “In general, do you feel satisfied with your company’s service quality?”, around 50% said okay; more than 21% are not satisfied and approximately 28% feel happy (Figure 21). Some people think that service quality is not so good, especially that it cannot be compared to foreign companies. However, the price is quite cheap so based on price-quality ratio, it is quite acceptable and worth trying. On the contrary, other respondents have a different perspective that there should not be any excuse; cheap cost does not have to be equal with bad quality. Hence, local firms should do better and try to improve their service as soon as possible so that they will not lose more customers in the future.

Figure 21. Satisfaction levels of “companies’ customer support policy” factor.
Figure 22. Satisfaction levels of “general service quality”.

35.43% decide not to recommend their freight forwarders to friends as well as to relatives. 34.65% are reluctant to make a final choice while only 29.92% can insist on suggesting those companies to other people (Figure 23). This means that customers are still in much doubt with domestics firms and not dare to give a full recommendation to them.
Similarly, when asked if respondents want to continue to work with their freight forwarders or not, one-third of the answers is again divided into three categories “yes”, “no” and “maybe”, as can be seen in Figure 24.

Figure 23. Are customers willing to recommend this company to relatives/friends?

Figure 24. Will customers continue to work with this company?
5 Conclusion and recommendations

5.1 Recommendations

5.1.1 Reliability

Gaining total trust from customers is the top priority of local firms at the moment since this factor is very low rated in the survey. The ultimate goal of logistics could be to understand roughly as “right quantity of right products in the right location at the right time”. Hence, companies always have to remember and follow this standard to provide excellent service and keep their image trustworthy to the customers.

- Apply Just-in-time (JIT) management method so as to reduce all extra costs and deliver goods on time. JIT method helps to move material into manufacturing process, warehouse or to the customer just in time to be used. This concept has appeared for a long time but it seems that local firms still underestimate its importance. The reason is probably because it requires synchronised operation between different phrases, which is a common weakness in Vietnamese companies. However, if they manage to handle it successfully, there is no doubt that service quality and customer loyalty will be improved significantly.

- Moreover, the “on-time delivery” factor is so low-rated, so companies must assure that they have enough and stable modes of transportation in order to keep the punctual delivery commitment. They should sign a long-term contract with carriers so that cargo will not be abandoned in peak season, especially in Christmas and Chinese New Year’s time.

- Operations with foreign agents should be guaranteed by tightening legal contracts. In contrast with developed countries, law does not necessarily play an important part in Vietnamese business, so local firms must learn how to protect themselves as doing business with foreign companies. The best and safest solution is to open their own representative office in that country to raise self-control.

- To avoid mistakes, there should be a supervising department to check everything from beginning to the end of the process, especially in documentation procedure, which was the most complained service of domestic firms. A supervisor must have professional knowledge as well as proficiency in English. Accurate
documentation will help to speed up the whole logistics process and gain more trust from customers.

- Companies should always inform about the progress of project so that it helps customers see real progress of the work and update their manufacturing plan. This factor is actually the bond between logistics firms and customers.
- “Track and trace” is a vital tool for customers to obtain information of their cargo. Almost every logistics firms all over the world have this tool; on the contrary, a large number of Vietnamese companies do not even have their own website. “Track and trace” is so convenient that it helps to reduce extra communication between customers and companies. Both sides will easily take the initiative and save time.

5.1.2 Assurance

The very low-rated factors “problem-solving skills” and “employees trust” basically result from weak internal force. As analysed in chapter 3, Vietnamese companies are completely defeated in capital, efficiency and operating network by foreign firms. Therefore, they have to strengthen their internal force to raise assurance by developing capital, human resources and connection with other local firms.

- Capital
  - Reinvestment to increase stock value or mutual fund.
  - Stock fund has proved to be an effective channel to raise capital.
  - Local enterprises should take advantage of concessional resources from the State. In addition, via associations they can propose to the government about how to support resources to develop the country’s logistics business.
  - Vietnam will join TPP in 2016 so the competition in logistics field will become much fiercer. Facing that situation, many enterprises have planned to restructure via Mergers and acquisitions (M&A) to raise their positions and provide growth.

- Human resources
Enterprises should pay attention to the quality of personnel right from new recruits since good quality input is undoubtedly a solid foundation for the development of long-term human resources. A very common problem of Vietnamese enterprises, especially of state-owned company, is the prior hire of descendant of an influential family, which is both unfair for regular candidates and bad for employers’ image. If this situation still continues, local companies will find it very hard to develop.

Since heavy paperwork was complained a lot as mentioned in chapter 3 and affected the “problem-solving skills” rating, it definitely should be reduced and employees should be given more power to solve small issues. The staff neither has to ask for permission from the managers nor waits a lot of time for the paperwork to get through. Instead, they can directly solve it by themselves if the case is not too big.

Besides, enterprises should maintain good relationship with logistics-majored university to recruit qualified staff via career fair or career talk.

Also, local firms should concentrate on intensive training to improve skills of their staff through both short and long-term training courses.

Employers should encourage employees to pursue further study or proficiency certificate by paying part of the tuition fee. This definitely helps to create loyalty and long-term commitment of employees for businesses.

Organisational culture plays a crucial role in motivating staff as well as clarifying goal orientation and nature of work. Simultaneously, corporate culture also creates good relationships between staff and a healthy work environment. Hence, building a unique culture should be considered an important job in local firms so that employees can feel proud to be a member of the enterprise.

Connections with other local companies

Set up links between businesses in the logistics industry as well as logistics companies and shippers for mutual benefit and development. These connections will become more effective with the help of professional associations, so enterprises should absolutely join logistics associations such as Vietnam Federation of Logistics Associations VFLA,
Vietnam ship owners’ association VSA, Vietnam automobile transportation association VATA, etc.

5.1.3 Tangibles

As analysed in chapter 4, website is a very low rated factor so it is absolutely the first thing to be changed. Many companies do not even have their own website, even if they do have, the website lacks a lot of helpful tools such as “track and trace”, shipping schedule, e-booking, etc. They also do not know how to optimize their content and overall visibility online. Website is the easiest and fastest way to gain first impression with customers, so local firms should hire web experts to create a professional website, which may cost a bit at first but will return many benefits later. If budget allows, enterprises can consider to improve the site's SEO (Search Engine Optimisation), which can significantly push the prominence of business in online search results.

Building brand image is a difficult task, which cannot be completed in one day but in a long term through consistent marketing campaigns. Among them, logo and slogan are the first two things that enterprises must consider. They can be printed on all transportation modes, envelops, uniform, gift for clients (raincoats, hats, pens, notebooks…) so that customers can recognise and memorise company’s image easily.

Besides, staff uniform is another way to promote company’s image. Not only should it be neat, polite and discreet, but it also should demonstrate unity and professionalism. Employees must feel comfortable to wear it too so that they can effectively work and communicate with clients. The colour should be well-harmonised and catches good impression from customers.

5.1.4 Responsiveness

The factor “provide on-demand service” was rated as the weakest one, so to expand and diversify the types of services provided to customers is essential for Vietnamese freight forwarders today so as to gradually develop towards comprehensive solutions of logistic services.
In addition, another factor significantly affecting the timely response to customer demand is the application of information technology (IT) to the enterprise. IT is growing strongly all over the world and helps to handle the job efficiently. The software helps to create and process documents quickly, accurately and systematically so that it will prevent errors causing losses for customers and carriers, and ultimately reduce the cost of management, personnel and time for business. The entire operation is computerized and avoid the loss of information; thereby improving the quality of services and global competitiveness. Some examples to consider are Transportation management system (TMS), Warehouse management system, etc.

5.1.5 Empathy

Good empathy of a company depends heavily on how well the staff performs. The friendliness and warmth of communication with customers will make them feel satisfied. So the managers should have specific policies to improve quality of employees.

- Motivate employees: Leaders must help employees realise that the work they are doing is totally suitable for their expertise as well as skills, and can help them develop their future career. It also makes important contributions to the development of the business. Besides, managers must know how to reward employees in order to motivate them.

- Train and coach employees: Organise training sessions that help employees understand better the importance and benefits of customer care service. Employees must master and apply both specialised knowledge and soft skills to satisfy customer. In addition, attitudes and behaviour of the employees must always be gentle, considerate, courteous and professional. Businesses need to connect both customer care culture and corporate culture together to create a long-term sustainable development.

As the customer support policy was rated quite low in the previous chapter 4, Vietnamese logistics firms should also have specific policy to maintain long-term business relationships.

- Have a regular customer care plan to create a close relationship with customers, especially the holidays like Chinese New Year. Gifts are an integral part of the visit to show interest for customers. The local firms even have to pay attention
to the customers not using the company's services anymore because there may come a time when they might be back due to good impression that businesses have for them.

- When necessary, companies can appoint staff directly to clients’ office to serve customers better. The direct contact will help understand and meet customer needs promptly.

Recommendations for the government

Firstly, planning and upgrading infrastructure are the most important priorities. Logistics operations cannot develop if infrastructure, ports, warehouses, etc. are not invested properly. Therefore, the government should improve infrastructure to meet the rising needs of logistics, reduce logistics cost and increase competitiveness for Vietnamese freight forwarders. The narrow road system and traffic jams everywhere are one the worst problems at the moment.

In addition, Vietnam custom is a very weak point and should be modernised as soon as possible. Not only are customs procedures very complicated and not transparent but customs staff are also authoritarian and corrupted, which really affects the quality of logistics services as well as the development of the domestic logistics industry. The government should complete the implementation of e-customs to speed up the procedures. Besides, investing in modern equipment such as container scanners, baggage scanners, surveillance camera systems, the tool support, etc. can help shorten the waiting time for enterprises and avoid cargo congestion.

5.2 Criticism of the research

Firstly, the total number of respondents in this survey was 127, which was not a very large sample to make any “waterproof” conclusions and probably did not well represent for the huge HCMC market. There should be at least hundreds of answers to contribute to a very good quantitative research, which was impossible to obtain in this time scope.

Secondly, the vast majority of companies studied in the survey were SMEs while there were only three large firms, so the result of the research did not reflect the whole
situation of local logistics companies’ service quality. The quality of large corporations is probably much better than that of the small-sized companies since they have enough capital to invest in both technology and human resources.

In addition, approximately two-third of the respondents did not answer the open-ended questions, which was not a surprising fact since it usually took more time and work to write long answers and not many people were willing to do that. However, the rest of the participants gave quite enthusiastic and qualified answers, which helped the author a lot to figure out specific problems they have with their logistics firms. Another interesting fact is that question 9 (problems with the company) received many more answers than question 10 (recommendations). Some people wrote a lot in question 9 but left the space empty in question 10. The respondents are likely to assume that the author would figure out the recommendations from the problems by herself. Yet, it could be much helpful if they were willing to give particular recommendations from their own perspectives. Most of the recommendations in the previous chapter came from the author rather than from the respondents.

Therefore, further studies would improve those weak points mentioned above by firstly choosing much larger and wider samples. The more respondents the more accurate the result is. In addition, different scales and backgrounds of the logistics companies should be also taken into consideration as the number of large-sized enterprises should be more balanced with the quantity of SMEs. Last but not least, a qualitative research can be conducted together with the quantitative survey since it will help to gain more varied and deeper results. For example, direct interviews with customers and managers/employees of logistics firms will clarify many more specific problems and therefore gain detailed recommendations from that, which is much better than some short answers written on paper.

References


Leeuwen, T., 2014. 1PL To 5PL: The Differences Between A 3PL Logistics Provider And Other Logistics Service Providers. [online] Available at:


Questionnaire of logistics service quality

I am doing a research about service quality of local logistics companies in HCMC. I really do appreciate if you would take your time to complete this questionnaire. The result is used only for my thesis, not for any other purposes.

Thank you very much!

Question 1: What is your current job position in your company?

....................................................................................................................................................

Question 2: In which section does your company operate?

(1) Industry
(2) Retail
(3) Service
(4) Other........................................................................................................................................

Question 3: What is the size of your company?

(1) Large-size (> 250 employees)
(2) Mid-size (50 – 250 employees)
(3) Small-size (< 50 employees)

Question 4: Which market does your company mainly trade in?

(1) Vietnam
(2) Asia
(3) Global

Question 5: Did you work with/partner with any LOCAL logistics companies in HCMC during the last one year?

(1) Yes. Could you please name one/some companies?
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(2) No. Could you please tell the reason why not?
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** If your answer is "No", you do not have to answer any other questions below.
If your answer is "Yes", please choose only ONE company to do this survey below and write the name of that company here.
......................................................................................................**

Question 6: How long have you been working with this local logistics company?
(1) Under 3 years
(2) From 3 – 5 years
(3) Over 5 years.

Question 7: Do you usually change logistics companies during the last 2 years?
(1) No
(2) Yes. Could you please tell the reasons why?
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Question 8
Please rate your opinion of your ONE current logistics companies on a scale 1 – 5.  
(1 --- Strongly dissatisfied,  5 --- Strongly satisfied)

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<td>Always deliver goods on time.</td>
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<td>2</td>
<td>Always keep and follow their promise.</td>
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<td>3</td>
<td>Always try to avoid mistakes and accidents</td>
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<td>Always notify you in advance about the project’s progress.</td>
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<td>5</td>
<td>Free resolve if there are errors in documentation.</td>
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<td>6</td>
<td>Provide accurate service right at the first time.</td>
<td>1</td>
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<td>Question</td>
<td>Statement</td>
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<td>7</td>
<td>Resolve all complaint satisfactorily.</td>
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<td>8</td>
<td>Employees gain total trust from customers.</td>
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<td>9</td>
<td>Customers feel safe when doing transactions with companies.</td>
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<td>10</td>
<td>Employees have polite uniform.</td>
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<td>11</td>
<td>Companies have modern and high-tech equipment.</td>
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<td>12</td>
<td>Companies have website so that customers can find information easily.</td>
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<td>Arrange suitable working time for customers.</td>
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<td>14</td>
<td>Always timely respond to customer demand.</td>
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<td>15</td>
<td>Employees are always willing to assist customers.</td>
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<td>16</td>
<td>Willing to provide on-demand service.</td>
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<td>17</td>
<td>Employees always take care and pay attention to customers</td>
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<td>18</td>
<td>Have good customer support policy.</td>
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<td>19</td>
<td>Always try to understand customers’ needs.</td>
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<td>20</td>
<td>Always listen to customers’ feedback.</td>
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<td>21</td>
<td>In general, you feel satisfied with companies’ service quality.</td>
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<td>22</td>
<td>You will recommend to your friends/relatives.</td>
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<td>23</td>
<td>You will continue to work with this company.</td>
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Question 9: Could you please name some specific problems you used to face when dealing with this company?
Question 10: Could you please give some recommendations/suggestions to improve logistics service quality in HCMC?

*** Thank you so much for your help again! ***
Phiếu khảo sát

Kính chào Anh/Chị,
Tối là học viên lớp cử nhân QTKD, Trường ĐH Helsinki Metropolia. Tôi đang nghiên cứu đề tài về chất lượng dịch vụ logistics tại các công ty giao nhận vận tải Việt Nam trên địa bàn TP.HCM. Rất mong các Anh/Chị dành chút ít thời gian để trả lời bảng câu hỏi bên dưới. Kết quả khảo sát chỉ phục vụ cho việc viết luận văn, không phục vụ cho mục đích nào khác. Xin chân thành cảm ơn!

Câu 1: Vị trí công việc hiện tại của Anh/Chị trong công ty là gì?

Câu 2: Công ty của Anh/Chị hiện đang hoạt động trong lĩnh vực nào?
   (1) Công nghiệp
   (2) Bán lẻ
   (3) Dịch vụ
   (4) Khác

Câu 3: Quy mô của công ty Anh/Chị?
   (1) Lớn (trên 250 nhân viên)
   (2) Vừa (từ 50 đến 250 nhân viên)
   (3) Nhỏ (dưới 50 nhân viên)

Câu 4: Công ty của Anh/Chị chủ yếu hoạt động ở thị trường nào?
   (1) Việt Nam
   (2) Châu Á
   (3) Toàn cầu

Câu 5: Trong một năm qua, Anh/Chị có giao dịch với các công ty giao nhận vận tải NỘI ĐỊA không?
   (1) Có. Anh/Chị vui lòng kê tên
Câu 6: Anh/Chị đã giao dịch với công ty này được bao lâu?
   (1) Dưới 3 năm
   (2) Từ 3 đến 5 năm
   (3) Trên 5 năm

Câu 7: Anh/Chị có thường xuyên thay đổi công ty logistics trong vòng 2 năm qua không?
   (1) Không
   (2) Có. Anh/Chị có thể nêu lý do tại sao không?

Câu 4. Vui lòng cho biết mức độ đồng ý của Anh/Chị cho các phát biểu dưới đây đối với công ty logistics nên trên theo thang điểm từ 1 đến 5.
(1 -- Hoàn toàn phản đối, 5 -- Hoàn toàn đồng ý)

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<td>20</td>
<td>Nhân viên công ty luôn lắng nghe những thông tin phản hồi từ Anh/Chị.</td>
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<td>21</td>
<td>Những chung phục Anh/Chị hài lòng với chất lượng dịch vụ tại công ty.</td>
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<td>22</td>
<td>Anh/Chị sẽ giới thiệu công ty cho bạn bè.</td>
<td>Có</td>
<td>Không</td>
<td>Có thể</td>
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<td>23</td>
<td>Anh/Chị sẽ tiếp tục làm việc với công ty.</td>
<td>Có</td>
<td>Không</td>
<td>Có thể</td>
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</table>

Câu 9: Anh/Chị có thể nếu vài vấn đề chưa hài lòng khi giao dịch với công ty logistics này không?
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Câu 10: Xin Anh/Chị đóng góp thêm ý kiến giúp nâng cao chất lượng dịch vụ tại các công ty logistics hiện nay trên địa bàn TPHCM.
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** Một lần nữa, xin chân thành cảm ơn sự nhiệt tình giúp đỡ của Anh/Chị. Chúc Anh/Chị niềm vui và nhiều sức khỏe.